

**CM/ECF
STANDARDIZED PROCEDURES FOR
SEARCHING AND CREATING NEW
PARTY INFORMATION
[ATTORNEY USERS]**

1. The system will display one of the two **Party Selection** screens (see Figure 1a and 1b).

Select the filer.

Select the Party:

Elisabeth Schwarzkopf [Plaintiff]
Joe Smith [Defendant]

[Add/Create New Party](#)

Figure 1a - Party Selection screen

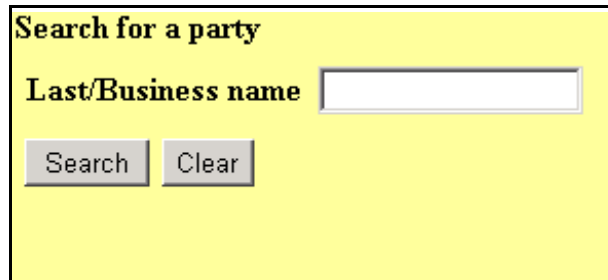
Please select the party that this filing is **against**.

Select the Party:	OR	Select a Group:
<div>Elisabeth Schwarzkopf [Plaintiff] Joe Smith [Defendant]</div>		<div><input checked="" type="radio"/> No Group <input type="radio"/> All Defendants <input type="radio"/> All Plaintiffs <input type="radio"/> All Parties</div>
<div>Add/Create New Party</div>		
<input type="button" value="Next"/> <input type="button" value="Clear"/>		

Figure 1b - Party Selection screen for the party this filing is **against**

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- a. A list of the parties in the case will be displayed for you to select the party(ies) who is filing the document or whom the document is against. To select the party(ies) who is filing the document or whom the document is against, click on that party's name to highlight it, then click the **[Next]** button.
 - b. If the party's name is **not** on the list, i.e., the document is adding parties to the case, click the [Add/Create New Party](#) hyperlink.
2. The system will display the **Party Search** (see Figure 2a) screen. This screen is for you to **Search for a party** and/or add a party. Below is a **Search hints for names** (see Figure 2b). Please review the **Search hints for names** before proceeding any further.



Search for a party

Last/Business name

Figure 2a - Party Search screen

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Search hints for names:

- You must enter at least two consecutive letters or characters of the party's last name or business name.
- This search is not case sensitive. You can enter either Smith or smith.
- A wild card (*) is not required at the end of a search string. Entering "wi," "Wi," or "wi*" will find Bob Williams and Wilson's Auto Parts, but will not find Smith, Willie, because the "wi" is in his first name.
- You can enter a wild card before the letters, if desired, to take the place of other letters. If you enter "*am," for example, you will find Cunningham, Bob; Amstutz, Judy; and United States of America, but will not find Armstrong, Dick, because the letters are not consecutive.
- Try alternate searches if your first search is not successful. **Make sure the name you want is not already in the database before adding it.**

Figure 2b - Search hints for names

To search for a party, enter the party's last name/business name or the first few letters of the party's last name/business name in the **Last/Business name** box and click the **[Search]** button.

3. The system will display the **Party search results** screen (see Figure 3). If the desired party was found in the search, you would click on the desired party's name to highlight it and then click on the **[Select name from list]** button to select the party. As soon as you click on the **[Select name from list]** button, the system will display the **Party Information** screen (see Figure 5). The **Party Information** screen will contain information pertaining to the party that was previously selected.

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Search for a party

Last/Business name

Party search results

Lawrence, John

Figure 3 - Party search results screen

4. If the desired party name does **not** appear on the **Party search results** screen (see Figure 4) or if the desired party is **not** in the database and the system displays the message **No person found.**, click on the **[Create new party]** button.

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The screenshot shows a web interface with a yellow background. At the top, it says "Search for a party". Below this is a text input field labeled "Last/Business name". Under the input field are two buttons: "Search" and "Clear". Below these buttons, it says "Party search results". Under that, it says "No person found." At the bottom of the screen is a button labeled "Create new party".

Figure 4 - Party search results screen

NOTE: Please make sure you have searched the CM/ECF database thoroughly for the desired party before clicking on the **[Create new party]** button. Failure to search thoroughly, will result in the addition of duplicated party names to the CM/ECF database.

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5. The system will display the **Party Information** screen (see Figure 5).

Party Information			
Last name	<input type="text" value="Wellington"/>	First name	<input type="text"/>
Middle name	<input type="text"/>	Generation	<input type="text"/>
		Title	<input type="text"/>
Role	<input type="text" value="Defendant (dft:pty)"/>	Pro se	<input type="text" value="no"/>
Prisoner Id	<input type="text"/>	Office	<input type="text"/>
Unit	<input type="text"/>	Address 1	<input type="text"/>
Address 2	<input type="text"/>	Address 3	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>
		Zip	<input type="text"/>
County	<input type="text"/>	Country	<input type="text"/>
Phone	<input type="text"/>	Fax	<input type="text"/>
E-mail	<input type="text"/>		
Party text	<input type="text"/>		
Start date	<input type="text" value="6/11/2003"/>		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/> <input type="button" value="Clear"/>			

Figure 5 - Party Information screen

- a. The **Last name** box will contain the search criteria that you had previously entered in the **Last/Business name** box in Step 1. Complete and correct the party's last name, if it is not complete and correct.

NOTE: If the party is a business or a government entity, enter the full name of the business or government entity in the **Last name** box as it appears on the document.

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- b. If the party is an individual, enter the party's first name in the **First name** box. **DO NOT** enter any information in the **First name** box if the party is a business or a government entity.
- c. If the party is an individual and the party has a middle name, enter the party's middle name in the **Middle name** box. **DO NOT** enter any information in the **Middle name** box if the party is a business or a government entity.
- d. If the party is an individual and the party has a generation, enter the party's generation in the **Generation** box. **DO NOT** enter any information in the **Generation** box if the party is a business or a government entity.
- e. If the party is an individual and the party has a title, enter the party's title in the **Title** box. **DO NOT** enter any information in the **Title** box if the party is a business or a government entity.
- f. Click on the down-arrow next to the **Role** box and select one of the options from the drop-down menu, if it is not already displayed.
- g. Click on the down-arrow next to the **Pro Se** box. If the party is a pro se litigant select **yes**. If the party is not a pro se litigant select **no**.
- h. If the party is **not** pro se and is **not** a prisoner, **DO NOT ENTER ANY INFORMATION IN THE Prisoner Id** box.
- i. If the party is **not** pro se, **DO NOT ENTER ANY INFORMATION IN THE Unit, Office, Address 1, Address 2, Address 3, City, State, Zip, Country, Phone, Fax, E-mail**, boxes.

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- j. If the party is pro se, refer to the **U.S.D.C. Southern District of New York's Standardized Procedures For Creating Pro Se and Prison Address Information in CM/ECF** and ENTER THE PRO SE LITIGANT INFORMATION IN THE **Office, Address 1, Address 2, Address 3, City, State, Zip, Country, Phone, Fax, E-mail**, boxes.
Please note that a business CANNOT be pro se.
- k. If the party is **not** appearing in the case in an official capacity, **DO NOT** ENTER ANY INFORMATION IN THE **Party text** box.
- l. If the party is appearing in the case in an official capacity, enter the information regarding the capacity in which the party is appearing. For example: Trustee for the Estate of George Wickham, Executor for the estate of Moll Flanders, Guardian for the minor Peter Pan, Governor of the State of New York, Mayor of the City of New York.
- m. **DO NOT** change the start date in the **Start date** box.

Check all information entered on the **Party Information** screen before proceeding to Step 5.

- 6. If the information entered on the **Party Information** screen is correct, click the **[Submit]** button and return to the **Party Selection** screen (see Figure 1a or 1b). Repeat Steps 1 through 6 until all the parties you need to add or added. Once you have added all of the parties you need to add, select the party(ies) who is filing the document or whom the document is against **AND CONTINUE THE DOCKETING OF YOUR EVENT.**

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7. If the information entered is incorrect, click the **[Clear]** button to clear the information that you have entered on the **Party Information** screen and re-enter the information.
8. If you would like to cancel the entry of the party information, click the **[Cancel]** button and return to the **Party Selection** screen (see Figure 1a or 1b).

CONTINUE THE DOCKETING OF YOUR EVENT